

EMPLOYEE EVALUATION

Employee _____ Evaluator _____

Date of Evaluation _____ For the period of _____

(3) - Exceptional; (2) - Meets Expectations; (1) - Needs Improvement

CLIENT SERVICE

Attitude when speaking with clients: (____)

Pleasant, compassionate, professional, courteous, shows respect to clients for the time it takes to come to office vs. indifferent, curt, overly familiar or unprofessional.

Facilitates the exchange of information: (____)

Asks insightful questions, able to follow leads, asks standard questions, thorough, gets copies of all documents, gets all forms signed, gives brochures, handouts, vs. fails to gather necessary and useful information.

Advocates for clients: (____)

Enthusiastic, advocates strongly for client to achieve as much as possible, professional, competent, knows what to expect in usual case, vs. apologizes for clients, blames clients for their problems, fails to explain options and consequences to clients so that they can make an informed choice, or creates unrealistic expectations.

Able to deal with difficult clients: (____)

Able to handle both clients and clients' problems without spending too much time, vs. able to handle clients' problem, but spending too much time, or has difficulty handling both clients and their problems.

Available to clients: (____)

Makes special arrangements for homebound clients, working clients, keeps regular office hours, returns calls promptly, vs. irregular hours, doesn't regularly return calls.

Reminds clients of hearings, deadlines: (____)

Recognizes clients with forgetful tendencies and makes extra effort to remind them of deadlines, routinely calls clients and sends reminder letters, vs. leaves clients to remember important dates on their own, doesn't take responsibility for managing what is next and what needs to be done.

COMMENTS & GOALS: _____

OFFICE PERFORMANCE

Dependable: (____)

Keeps regular office hours, calls in when sick, doesn't abuse sick leave, co-ordinates time off with others, vs. uses sick leave as vacation, doesn't keep regular office hours, doesn't co-ordinate time out of the office with others whenever possible.

Keeps accurate records:()

Time reports and travel expenses submitted on time, receipts and deposits, keeps good notes in memo fields, keeps next activity fields current, makes sure that all required forms are in files and signed vs. submits late and incomplete records, doesn't follow standard procedures and policies.

Knows status of cases:()

Knows case list and upcoming deadlines, uses tickler system, has litigation plan for each case, vs. reacts only to opposing party or court notices, procrastinates, waits until a deadline to start.

Knows and follows LSC regulations:()

Demonstrates basic knowledge and follows regulations and policies, investigates questions about requirements and communicates to others in the office, vs. does not appear aware of regulations.

Works to improve performance:()

Sees need for improvement without being told, shows initiative in seeking training, responds well to suggestions, takes training when routinely available vs. does not recognize problems in own performance or rejects suggestions of others.

Demonstrates a dedication to work:()

Shows initiative in assisting others as workload permits, takes care of own responsibilities in a professional manner, vs. acts disinterested in job, not willing to seek out or accept additional work.

Demonstrates a sense of priorities:()

Knows what tasks are most important and applies all necessary energy to those tasks, willing to work late when necessary with prior approval if flsa, generally knows what needs to be done immediately and which items can wait, vs. works on most recent problem, favorite projects or clients regardless of importance.

Follows through with assignments:()

Completes assignments ahead of schedule and helps others with their tasks, meets deadlines, vs. misses deadlines.

Not easily distracted or distracting:()

Able to get others back to work, able to focus on work, vs. is easily distracted by non-work activities, or talks too much.

Creative:()

Finds amazing solutions to difficult problems, able to solve average problems competently, vs. finds most problems insurmountable, finds excuses to turn clients away without assisting them, resists changes in procedures and new approaches to old problems.

Good natured about taking on additional tasks:()

Recognizes need and offers to handle a hearing or trial for another advocate, willing to take on additional tasks when asked, such as travel for filing, making deposits, working at the front desk, vs. is reluctant to assist others or expand responsibilities.

Attitude:()

Pleasant, helpful to others, hard working, courteous to others, applies self to business, vs. distant, not hard working or focused on the business of the office, wastes time of self and others.

Self-motivated:()

Assists others, does not need much supervision, mature, asks questions when necessary, vs. needs frequent reminders.

COMMENTS & GOALS: _____
